



Principal National Life Insurance Company
Principal Life Insurance Company
Principal Securities, Inc.

January 20, 2022

JOHN BARRETT INC
333 W 56TH ST
APT 10FG
NEW YORK NY 10019-3764

Re: Insured - John Barrett
Policyowner(s) - John Barrett Inc
Life Insurance Policy No. Principal Life Insurance Company 4829800

Dear John Barrett Inc ,

We received a request from Valmark Financial Group to send them information on your policy. Since they are not authorized to receive this information, we are sending it to you.

1. Statement of Coverage
2. Most recent Annual Statement

We were also asked for a copy of the original policy and application, but we are unable to release policy files. This term policy is convertible to any current permanent product Principal Financial Group offers.

We're here to help. If you have any questions, please call us at the number listed below. Thanks for choosing Principal® for your insurance needs.

Sincerely,

Individual Life Insurance
Customer Service
(800) 247-9988

Your representative
STEPHEN I GILBERG
(914)227-9021
Agency: 2154-Z

Enclosure

Copies to: All Policyowners

Corporate Center: 711 High Street, PO Box 10431, Des Moines, Iowa 50306-0431, (800) 247-9988, FAX (866) 885-0390, www.principal.com
Insurance products from the Principal Financial Group® are issued by Principal National Life Insurance Company (except in New York)
and Principal Life Insurance Company. Securities are offered through Principal Securities, Inc., (800) 247-9988, member SIPC.
Principal National, Principal Life, and Principal Securities, Inc. are members of the Principal Financial Group®

Classification: Customer Confidential



Individual Life Insurance
711 High Street
Des Moines, IA 50392

Principal Life Insurance Company

JOHN BARRETT INC
333 W 56TH ST
APT 10FG
NEW YORK NY 10019-3764

January 07, 2022

Insured - John Barrett
Policyowner - John Barrett Inc
Term Life, Policy Number 4829800

STATEMENT OF COVERAGE (Values as of 01/07/2022)

Policy status	In Force
Policy date	03/16/2015
Issue state	NY
Face amount of base policy	\$10,000,000.00
Maturity date	03/16/2052
Final conversion date	03/15/2025

The last premium payment of \$3,702.15 was received on 12/16/2021 and was applied 12/16/2021.

Total premium paid	\$303,576.30
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Unused premium	\$1,110.64
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Primary beneficiary — JOHN BARRETT INC
Contingent beneficiary — None Listed
Assignee — None Listed
Secondary addressee — None Listed

Individual Life Insurance
Customer Service
800.247.9988
Mon-Fri 7:00 am - 6:00 pm CT

Your Financial Representative:
Stephen I Gilberg ChFC CLU
914.227.9021



Individual Life Insurance
711 High Street
Des Moines, IA 50392

JOHN BARRETT INC
333 W 56TH ST
APT 10FG
NEW YORK NY 10019-3764



Life insurance policy annual statement

Prepared on 03/16/2021

JOHN BARRETT INC
333 W 56TH ST
APT 10FG
NEW YORK NY 10019-3764

Policy number

4829800

Policy type

10-Year Term

Policy date

03/16/2015

Face amount

\$10,000,000

This is not a payment request.

Policy summary (as of 03/16/2021)

**Insured
Owner**

John Barrett
John Barrett Inc

**Monthly premium
Final conversion date**

\$3,702.15
03/15/2025

Important information

Conversion privilege (see final conversion date above)

- Your policy includes a conversion privilege which is available for a limited period of time. Prior to the end of the conversion period, you may convert all or part of this Term policy's face amount to a permanent life insurance policy without the need to provide evidence of insurability. Please refer to your policy for additional details and contact your financial representative or our Customer Service Center if you have any questions.

Additional premium charges

- For premium payment frequencies other than annual, there is an additional charge, as demonstrated in the table below.

Premium payment frequency	Premium amount	Annualized premium	Premium payment frequency charge
Annual	\$42,310.30	\$42,310.30	\$0.00
Semi-Annual	\$21,684.03	\$43,368.06	\$1,057.76
Quarterly	\$11,106.45	\$44,425.80	\$2,115.50
Monthly	\$3,702.15	\$44,425.80	\$2,115.50

Note: Monthly frequency is only available if set up for Pre-Authorized Withdrawals.

Notes

- Please refer to your policy for a detailed explanation of the benefits shown above.
- You may obtain policy information and request service forms by visiting our website at principal.com.



Your current email address: Not on file

To change your email address, go to principal.com or call our Customer Service Center at the number shown below.

Contact us

For additional information regarding your policy, please use any of the following resources:

Your Financial Representative

MICHAEL B DRANOFF
973.535.0955

Principal Life Insurance Company

Customer Service Center
800.247.9988
Mon-Fri 7:00 am - 6:00 pm CT

Mailing address:

PO Box 10431
Des Moines, IA 50306-0431



Principal Life Insurance Company
Principal National Life Insurance Company
P.O. Box 10431, Des Moines, IA 50306-0431
www.principal.com

Your policy indicates its issuer, which is the company responsible for the policy obligations and is referred to herein as the 'Company'.

Secondary Addressee for Life Insurance

For Assistance: 800-247-9988

Fax: 866-885-0390

Email: IndLifeService@exchange.principal.com

PLEASE PRINT CLEARLY

Policy Information

Policy Number(s)

On the Life of (the insured)

Why use this form?

You have the option to select another person (Secondary Addressee), other than yourself, to receive copies of any grace* and termination letters regarding your life insurance policy. If at this time you don't want to select someone to receive these copies, or you've already set someone up as a Secondary Addressee, no action is required.

Why would I want someone else to receive this information about my policy?

Your life insurance policy is there to protect what's important to you. But, when the unexpected happens, you may want a back-up plan. Your Secondary Addressee can receive copies of letters when the policy is at risk of terminating. Your Secondary Addressee could be anyone you choose, like a family member or trusted friend. (The Representative on the policy can't be added as a Secondary Addressee).

You can cancel or change your Secondary Addressee by providing verbal or written notice to us at any time.

How to select someone to receive copies of grace period and termination letters

Return this completed form to us at the address listed above. You have the option to return the form by certified mail, return receipt requested, to verify delivery of your request.

First and Last Name of Secondary Addressee

Address of Secondary Addressee

City

State

Zip

Phone

()

Final step – Your signature

For policy(ies) with multiple owners, the owners must agree on the Secondary Addressee and the owner's signature below reflects this agreement. Only one policyowner is required to sign this form.

I instruct Principal to accept and process this request.

Printed Name of Policyowner

Policyowner Signature (Please use title if corporate or trust owned)

Date

*For policies issued before 1999, the Secondary Addressee may also receive copies of billing notices. For some policies, the "Late Remittance" billing notice serves as a grace letter.

This is not a Beneficiary Change form



PRIVACY NOTICE

This Notice is provided on behalf of the following companies of the Principal Financial Group®:

Principal Life Insurance Company

Principal National Life Insurance Company

Principal Trust Company

Principal Life Insurance Company Variable Life Separate Account

Principal National Life Insurance Company Variable Life Separate Account

Principal Life Insurance Company Separate Account B

Employers Dental Services, Inc. / Principal Dental Services, Inc.

Protecting your privacy

This Notice is required by law. It tells how we handle personal information.

This Notice applies to:

- people who own or apply for our products or services for personal use.
- employee benefit plan participants and beneficiaries.

Please note that in this Notice, "you" refers to only these people. The Notice does not apply to an employer plan sponsor or group policyholder.

We protect information we collect about you

We follow strict standards to safeguard personal information. These standards include limiting access to data and regularly testing our security technology.

How we collect information

We collect data about you as we do business with you. Some of the sources of this data are as follows:

- **Information we obtain when you apply or enroll for products or services.** You may provide facts such as your name; address; Social Security number; financial status; and, when applicable, health history.
- **Information we obtain from others.** This may include claim reports, medical records, when applicable, credit reports, property values and similar data.
- **Information we obtain through our transactions and experience with you.** This includes your claims history, payment and investment records, and account values and balances.
- **Information we obtain through the Internet.** This includes data from online forms you complete. It also includes data we collect when you visit our websites.

How we share information

We may share personal information about you or about former customers, plan participants or beneficiaries among companies within the Principal Financial Group or with others for several reasons, including:

- to assist us in servicing your account;
- to help design and improve products;
- to protect against potential identity theft or unauthorized transactions;
- in response to a subpoena or for other legal purposes;
- to prevent fraud;
- to comply with inquiries from government agencies or other regulators;
- with others that service your account, or that perform services on our behalf; and
- with your consent, at your request or as allowed by law.

Medical information

We do not share medical information among companies of the Principal Financial Group or with others except:

- when needed to service your policies, accounts, claims or contracts;
- when laws protecting your privacy permit it; or
- when you consent.

Accuracy of information

We strive for accurate records. Please tell us if you receive any incorrect materials from us. We will make the appropriate changes.